

HOW TO... Use Excel lists

Janet Swift takes you through Excel's lists facility, an easy-to-use feature that makes it much simpler to interact with tables of data and collate information

SAMPLE EXCEL SPREADSHEET



Whether you have just started getting to grips with Excel or you're a long-term user, the chances are you haven't made the most of it. You may be overlooking features that can make your life easier. Here we introduce you to lists, which are new to Excel 2003, though earlier versions offer near-identical functions using Filter, AutoFilter on the Data menu. Lists are ideal for interacting with tables of data. You'll find our spreadsheet on the cover disc.

1 The remarkable feature of the lists facility is how easy it is to use. Place the cursor anywhere within the data for 2005, say in D6, and right-click. Select Create List from the pop-up menu. The entire block of cells from A3 to G16 is automatically identified with a marquee box around it. The adjacent table is ignored because there is an empty column between the two blocks of data. Similarly, the heading in Row 1 is not considered part of the list as there is an empty row between it and the data. In case this isn't the area you require, the Create List dialog box opens and allows you to edit the range selected if necessary. In this case no change is required. Simply ensure that the box next to 'My list has headers' is ticked and click OK.

2 A few changes will have been made. The most noticeable are the drop-down arrows beside each column header. The column headers will also have been made bold, but this won't be obvious if they were formatted as bold in the first place. The List toolbar should have opened

automatically. If it didn't, go to the View menu, select Toolbars, then List. Clicking on the Toggle Total Row button – the one with a Greek letter Σ on it – in the List toolbar will produce the sum of the final column in the list. This is cell G18 in our example. It places a label, Total, in the row as well, in cell A18. As our table doesn't have a column totalling figures for the four quarters, we don't want this single total on its own.

Place the cursor in one of the empty cells in the Total row, such as D18. A drop-down arrow appears next to the bottom right-hand corner of the cell. Click on this to see a list of total types that you can choose from. For cells D18, E18 and F18, choosing Sum complements the total already in cell G18. But in some circumstances, one of the alternatives, such as Average, might be better. Or you could select Count in cell C18 to get the number of individuals in the table.

3 Other frequently required facilities are accessed by the drop-down arrows. Click on the one next to Salesperson. The top item in the drop-down list is Sort Ascending. Click on it and the list is instantly sorted into alphabetical order according to the salespeople's names.

4 The filter action is equally easy to use. Say you want to see the results only for male personnel in the London branch. First click on the drop-down arrow next to Regional Office and choose London. The totals reflect the reduced set now on view. Now click on the drop-down arrow beside Gender and select Male. The set of data is

further reduced and again the totals are adjusted. Data also disappears from view in the rest of the spreadsheet as entire rows are hidden, which can be verified by inspecting the row numbers at the edge of the spreadsheet. The data will be restored when you select All in the drop-down list.

5 Another type of filter is available. Open the drop-down menu next to the Q4 header and select the Top 10 item. This opens the Top 10 Autofilter box. In this case we want to display the five best-performing sales figures for the fourth quarter, so use the down arrow next to the middle box to change the value to 5. Then click OK. To restore all the data, use the All filter in the same way as described in Step 4.

6 One of the advantages of lists is that you can insert and delete rows within them without affecting other areas of the spreadsheet. To see this in operation, create a list from the second block of data. As there are headings for the second, third and fourth quarters, the empty cells are included in the list. You can add data to the end of the list by typing into the row with the blue asterisk. Alternatively, you can use the Insert row command. Place the cursor in I6 and right-click. Select Insert and then Row and enter the data you want (Gee in I6, B in J6, which Excel auto-completes to Birmingham, F, which enters Female, in K6 and 306 in L6). To delete the data for Wilkinson, right-click in I10, select Delete and Row and click OK. The list on the left remains unaffected by these operations. ☐

Regional Office	Gender	Q1	Q2	Q3
London	Male	8176	8457	77
London	Female	60	65	60
Southampton	Male	65	60	60
Edinburgh	Male	88	12	75
Edinburgh	Female	91	53	61
Birmingham	Male	50	72	45
Birmingham	Female	45		

	A	B	C	D
11	Swift	London	Female	None
12	Browne	Edinburgh	Male	Average
13	Fraser	Edinburgh	Female	Count
14				Count Nums
15	Jordan	Birmingham	Male	Max
16	Scott	Birmingham	Male	Min
17	*			StdDev
18	Total			Var
19				

Salesperson	Regional Office	Gender
Southampton	Southampton	Male
London	London	Female
Edinburgh	Edinburgh	Male
Edinburgh	Edinburgh	Female
Birmingham	Birmingham	Male
Birmingham	Birmingham	Female
Edinburgh	Edinburgh	Male
London	London	Female
Birmingham	Birmingham	Male
Birmingham	Birmingham	Female

Regional Office	Gender	Q1
London	Sort Ascending	6021
London	Sort Descending	1201
London	(All)	8176
London	(Top 10...)	9106
London	(Custom...)	
London	Female	
London	Male	

Regional Office	Gender	Q1	Q2	Q3	Q4
Southampton	Male	6545	6298	6234	6309
Edinburgh	Female	6123	6222	6652	6420
London	Male	8176	8457	6652	6662
Birmingham	Male	7243	5831	7005	7015
Birmingham	Male	4523	6899	8105	8464
London	Female	9106	8508		

Salesperson	Regional Office	Gender
Freeman	London	Male
Brown	London	Female
Carter	London	Male
England	London	Male
Scott	London	Male
Wilson	London	Female
Wilkinson	London	Male
Adams	London	Female
Browne	London	Male